

Setting Up AwardPro for Your Business

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Introduction

Setting Up AwardPro to suit your business is easy and does not take much time or effort. What is very important is that you follow this guide step-by-step. This will ensure everything gets set up quickly and correctly.

AwardPro provides the flexibility to re-arrange selling conditions to suit your business within one hour of installation. Once set up you can easily go back and re-structure areas, so don't stress about what you are doing.

In delivering AwardPro to you with data pre-installed we have set some standards and defaults that you will want to adjust for your business. These standard defaults such as Mark Up, Departments and Process Charges may not suit your business, so it is up to you to go through these settings and edit them to suit your own business. Don't worry, this is easy to do.

In addition to the documentation we have created a set of **videos to help you get set up**.

Watch the Getting Started Videos [Click Here](#)

The important thing to note here is that if you follow our direction you will get fully set up quickly and effectively.

Ok, let's get started with the revolution.

Logging In for the first time.

The system comes with a default log in user name:supassword:su

Your Network System

It is presumed here that you have already done the install of the work stations according to the install instructions and that you have all workstations networked to the server computer and that all workstations can log into AwardPro.

Step 1

Company Registration

Company Registration

Go to: System Set Up>Company Registration

Set up your company details including adding your logo. This information is used on forms throughout the program.

[Click here to watch the Company Registration Video](#)

Company Logo

- The logo is used on forms and a set area is allocated for this. Long logos can sometimes become quite small due to the width allocation which cannot be changed in this version.
- **Important** -Do not use large sized mega pixel images for your logo as they will make your pdf quote forms very large and slow to email. You only need a small sized image here.

Adding your logo

1. Right click in the square and select Load to upload your logo.
2. Save

Email Addresses

There are 3 different department email addresses required. If you only have one or two email addresses then just add those in and fill in the blank field with one of the email addresses, so that all fields are filled in.

These addresses are used on different forms so that your customers can address emails to the right person. For example, Quotes and Order Confirmation forms have the sales and art department email address displayed. Final invoice and customer statements only have the accounts email address displayed, as this is where the payment should be directed.

Company Slogan, Trading Hours, Web address

This gets added to catalogue price lists, Quotes and Job Sheets. It is not mandatory to fill this in.

Bank Details

Bank Details are added to the customer's quote, order confirmation, invoice and statements.

Step 2

Set Up Your Team as Users

[Set Up Your Team](#)

Go to: System Set Up>Security Settings

[Click here to watch the Setting Up Users' video](#)

You have logged in for the first time with the default user log in. Now it's time to create your own log in and at the same time you can set up log in for your staff.

Everyone that uses Awardpro should have a user name and log in password. All Staff become registered users and have their own password to log in to the system which allows the program to know who is performing certain tasks. All users get allocated a security level which restricts them from entering certain areas. See the Security Level Grid Document that shows you what the security levels allow.

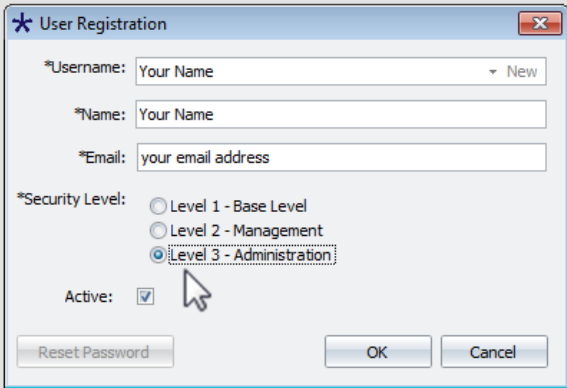
- Basically, Business owners should be Level 3 which makes them an Administrator and provides access to Sales Analysis reports.
- If a staff member orders stock or will be involved in creating products they should be a Level 2 User.
- If a staff member is primarily production and would not be involved in creating products they should be a Level 1 User.

When a staff member Logs in their name gets associated with certain transactions such as Sales Orders, Supplier Orders, Contact Logs, Production task checking, deleting of payments etc.

The Business Manager's task is to set everyone up as users and then get them to go to 'My Account' and change their password to a unique password.

Let's do it – Set Yourself Up

Go to: System Set Up>Security Settings

	<ol style="list-style-type: none">1. Fill in Username, Name and your email address2. Select Level 3 – Administrator for yourself3. Make sure Active is ticked.4. Press OK
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Your name becomes the default password and you then go to My Account and set up a secret password.

Now Set Up Your Staff

1. On the User registration Screen (above) press **New**
2. Add in your staff details
3. Set their security Level. (see Level Access details next page)
4. Press OK

Next everyone goes to My Account and sets up their own secret passwords

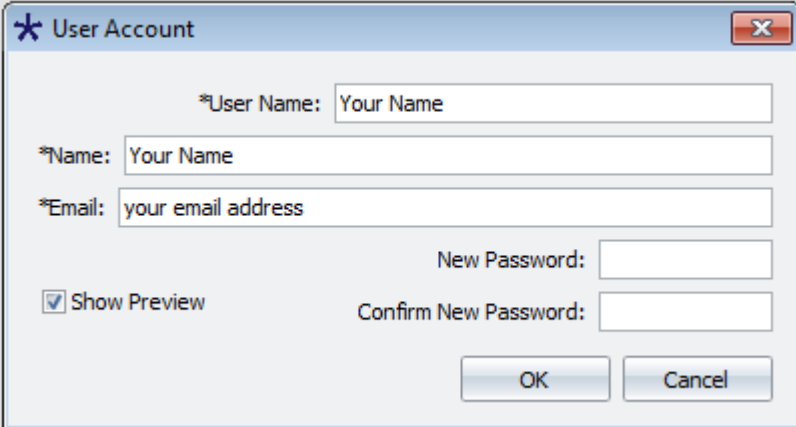
Security Level Access detail

Level 3	Level 2	Level 1
Tax Rate Exchange Rate Mark Up Sales Budget Operating Costs Departments Lost reasons Order set up Back Up Sales Analysis Customer Sales report Item Sales Report Department Performance Sales Budget Historical Sales & Profit Sales and Profit Report Item Sales report Payment Exceptions Report Analyse Sales Performance	Customer Types Product Types Process Types Payment terms Payment Methods Delivery Methods Terms & Conditions Value Add Export Component List Export Component Types Inventory Value Report Export Product Catalogue Export Product Types All Price Lists Mailing facility Supplier Performance Debtors reports Statements Supplier Small Order Invoiced Jobs Report Payments report Product Information Information Centre	Basic Access to: Job Schedule Stock Orders Sales Screens

OK Next You Set Your Unique Password

Go to: System Set Up>My Account

1. Exit out of the program and then log back in with your new user name details
2. Go to System Set Up>My Account
3. Enter a new password and confirm it.
4. Tick the Show Preview Button
5. OK



The screenshot shows a 'User Account' dialog box with the following fields and options:

- *User Name: Your Name
- *Name: Your Name
- *Email: your email address
- New Password: [empty field]
- Confirm New Password: [empty field]
- Show Preview
- OK button
- Cancel button

So now you will log in with Your Username and secret password

Get your team to do the same thing

If you set up your team previously you just need to get each of them to log in with the username you gave them and then go to My Account and create unique passwords.

Done! Let's go set up your prices.

Step 3

Set Up Your Product Mark Up

Mark Up

Go to: System Set Up>Mark Up Centre

Must Read Introduction

We have made it really easy to quickly set the whole system up with your preferred mark up. You just make a few tweaks and it's all done.

How we set the default prices

By default AwardPro comes with all products set at the suppliers' recommended retail price for sports trophies and a nominal default mark up for Crystal, Glass and Acrylic awards.

All you have to do is choose the Model that suits you and follow the step by step guide and all products will get re-modelled for your business.

We have also built into all products an engraving process that can be adjusted to suit your pricing, or it can be removed altogether. You see, the idea is this; some of you like to add the price of engraving into your product's retail price and some of you add this price on separately and some of you do a bit of both. So we've added it into everything set at a value of zero. You can either set the price to suit you or remove the process in a flash. In this step we'll take care of the mark up side and then we'll deal with the process side.

Let's understand how mark-up is applied in AwardPro

Some people use a mark-up factor of "times 2" etc or "Plus 100%" etc. Let's get our heads around how these two factors are different yet the same.

If you mark up at, say, times 2 then what you are really doing is marking up by 100%

$\$10.00 \times 2 = \20.00 is exactly the same as $\$10.00 + 100\% = \20.00

$\$10.00 \times 3 = \30.00 is exactly the same as $\$10.00 + 200\% = \30.00

AwardPro uses the PLUS MARK UP% system

This means if you are used to marking up by a multiple factor then you now need to think PLUS PERCENTAGE. So if you used to mark up by times 3 then now you mark up at Plus 200% to get exactly the same result. If you marked up at times 2.35 then you will now be marking up at 135%

Once prices are re-set you may find your showroom ticket price is different to AwardPro

You are likely to find that once prices have been set the prices AwardPro shows will be different to the prices that the items in your showroom say. This will usually be because your showroom prices are not exactly current prices.

Summary

You either use recommended retail or you have your own business mark-up. The mark-up centre is where you make it all happen.

You either add the price of engraving into your products or you add this on separately. No problem. We'll take care of this in another step shortly. Let's just focus on mark up for now.

How the Mark Up Centre Works

The screenshot shows the 'Mark Up Centre' window with the following sections:

- Product Default Mark Up:** System Default Mark Up %: 300.00 % (Apply, Reset All). Note: Enter your businesses nominate general Mark-Up and Press Apply. To Reset all product Mark-Ups enter a percentage and press Reset All. (Reset All will wipe out Recommended Retail)
- Component Only Default Mark Up:** Mark Up %: 0.00 % (Reset All). Note: To adjust all Un-Locked Component Type Mark Ups enter your businesses nominated Component Only Mark-Up and Press Apply.
- Retail Products Price Global Change:** Increase all Retail Prices by %: 0.00 % (Apply); Decrease all Retail Prices by %: 0.00 % (Apply). Note: **Retail Price Global Change Adjustment Notes** This action will adjust the end price BEFORE TAX of every product by the percentage you apply. e.g. Increase by 10% will take a \$10.00 product and make it \$11.00
- Product Types:** Select a Product Type: [dropdown]. Current mark up: 0.00 % (Apply). Increase All Retail Prices By %: 0.00 % (Apply); Decrease All Retail Prices By %: 0.00 % (Apply). OR. Reset Product Type mark up values to %: 0.00 % (Apply). Note: **Product Type Adjustment Notes** If you use recommended retail for you sports catalogues DO NOT adjust Product Type Mark Up for the product types that are found in the sports catalogues. The Product Types in Recommended Retail Import files are: General Sports, Perpetual Trophies, Shields, Medals - Standard, Medal Cases. Read the Help Document for clarification.
- Catalogue Price Lists:** Select a Price List: [dropdown]. Increase All Retail Prices By %: 0.00 % (Apply); Decrease All Retail Prices By %: 0.00 % (Apply). OR. Reset Price List mark up values to %: 0.00 % (Apply). Note: **Catalogue Price Adjustment Notes** If you do not use Recommended Retail Prices you can adjust whole catalogues to your mark-up standard here. Or you can just adjust the Product Type Mark Ups which gives you the flexibility of having different mark ups for different types such as general Sports and Medals. If you do use Recommended Retail Price then they are pre-set correctly at install.

At the bottom, a warning message reads: **USERS ARE WARNED TO READ THE HELP DOCUMENT AND WATCH THE TRAINING VIDEOS ON THE MARK UP CENTRE BEFORE MAKING CHANGES** (Close)

Warning

If you use recommended retail price **DO NOT** press the **Reset All** button next to the **Product Default Mark Up%**

The text on the right hand side of the different sections tells you what the sections are for and do. Make sure you read this and understand exactly how this feature works.

Recommended Retail Users

If you use recommended retail price for sports trophies then make sure you do not adjust the mark up for the product types - General Sports, Perpetual Trophies, Shields, Medals - Standard and Medals Cases. If you do change these mark ups you will ruin the Recommended retail setting.

There are plenty of videos and help documents to help you get to know the power of the Mark Up Centre.

[Click here to watch videos on the Mark Up Centre](#)

Let's get Started

Please choose the model that suits your business and follow those instructions to set your mark ups.

Model 1

I use recommended retail price And I add engraving into the price of my trophies

Ok this means that the prices for your sports catalogues are set up correctly already. All you have to do is a) set the price for engraving and b) set the mark up for things like Crystal Trophies.

Set the Mark Up for Corporate Awards

1. In the Mark Up Centre go to the Product Types section and select Acrylic Trophies

Product Types
Select a Product Type: Acrylic Trophies

Current mark up: 200.00 %

Increase All Retail Prices By %: 0.00 %

Decrease All Retail Prices By %: 0.00 %

OR

Reset Product Type mark up values to %: 0.00 %

Product Type Adjustment Notes

If you use recommended retail for your sports catalogues DO NOT adjust Product Type Mark Up for the product types that are found in the sports catalogues.

The Product Types in Recommended Retail Import files are:

General Sports, Perpetual Trophies, Shields, Medals - Standard, Medal Cases

Read the Help Document for clarification.

2. Enter the mark up that you want to sell your acrylic trophies at into the field called **Reset Product Type mark-up values to %:** and then press **Apply**
This action changes every Acrylic trophy in the System to that mark Up value.
3. Now do the same for these Product Types: Crystal Trophies, Glass Trophies, Paper Weights and Deskware.

Set the Built in Engraving Prices for Sports Trophies

Go to: Products>Process Editor

1. Open up the Process Editor and find the Process Description called – TROPHY ENGRAVING

Process Editor

Filter by Process Type: New Show All

Process

*Process Description: TROPHY ENGRAVING New

*Process Type: Engraving - Diamond

Last Modified: 4/04/2011 9:42:15 AM

Notes

Qty	Price	Price Inc
1	\$2.00	\$2.20 X

The Process called TROPHY ENGRAVING has been embedded into every sports/general trophy in the system. It is set at \$0.00 so it has no impact on the default recommended retail price. If you change the value here you will have added that value to the retail price of the trophy.

e.g. Recommended Retail is \$10.00 – Set TROPHY ENGRAVING TO \$2.00 plus tax and the retail price changes to \$12.20. Get it? The value you set this to now will get added to the sell price of the trophies.

2. Enter the value you want to build into your trophies for engraving and press the save button.
3. While you are in this screen take a look at the Process Type.
 - a. By default it is set to Engraving Diamond. If that is how you engrave trophies then you are done.
 - b. If you use laser Engraving or Sublimation for trophy Plate engraving then just select that process type and save.
4. Do the Same with MEDAL ENGRAVING

Model 2

**I use recommended retail price
And I do not add engraving into the price**

Ok this means that the prices for your sports catalogues are set up correctly already. All you have to do is a) set the price for engraving and b) set the mark up for things like Crystal Trophies.

Set the Mark Up for Corporate Awards

1. In the Mark Up Centre go to the Product Types section and select Acrylic Trophies

The screenshot shows a web interface for adjusting product types. On the left, under 'Product Types', there is a dropdown menu with 'Acrylic Trophies' selected. Below it are three input fields: 'Current mark up:' with '200.00 %', 'Increase All Retail Prices By %:' with '0.00 %', and 'Decrease All Retail Prices By %:' with '0.00 %'. Each has an 'Apply' button. Below these is an 'OR' separator and a 'Reset Product Type mark up values to %:' field with '0.00 %' and an 'Apply' button. On the right, under 'Product Type Adjustment Notes', there is a warning: 'If you use recommended retail for you sports catalogues DO NOT adjust Product Type Mark Up for the product types that are found in the sports catalogues.' Below this, it lists 'The Product Types in Recommended Retail Import files are: General Sports, Perpetual Trophies, Shields, Medals - Standard, Medal Cases' and a link to 'Read the Help Document for clarification.'

2. Enter the mark up that you want to sell your acrylic trophies at into the field called **Reset Product Type mark-up values to %:** and then press **Apply**
This action changes every Acrylic trophy in the System to that mark up value.
3. Now do the same for these Product Types: Crystal Trophies, Glass Trophies, Paper Weights and Deskware.

Please note that all products have engraving processes built into them. But these charges are set to zero and are waiting for your price decisions. You can either set a built in price or you can remove the process from all products very quickly. We will deal with this in the next step.

Model 3

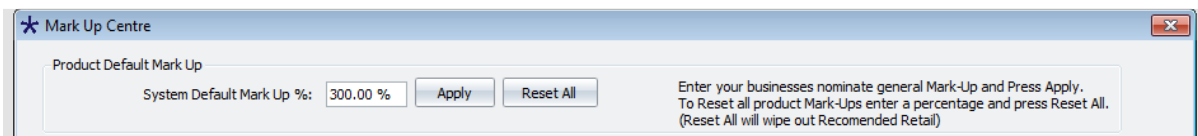
I have one mark up for everything Or at least almost everything

You do not use recommended retail price. You have your own business charter and you make your own price decisions. Good on you.

So this means you are happy to wipe out the default recommended retail price and set prices to suit yourself.

In your case you use one mark-up value for all products or at least mostly all products. Excellent, you're an easy fix.

1. **Go to:** System Set Up>Mark Up Centre
2. In the top of the screen add in your default mark up



3. Press the **Reset All** Button

WARNING

This action will wipe out recommended retail price which will not be recoverable unless you re-import the entire range of catalogues.

OK, you are done. All prices have been set to your Mark-Up Value. You might want to make a few changes to different product types such as Name Badges or giftware where you have a different mark up to your standard. This is done in the Product Types Section of the mark Up Centre. Just select a product type and change the mark up for that specific product type.

Model 4

I have different Mark-Ups for different things

You do not use recommended retail price. You have your own business charter and you make your own price decisions. You set different products to different mark up levels such as: sports trophies at one mark up, corporate awards at another mark up.

So this means you are happy to wipe out the default recommended retail price and set prices to suit yourself.

In your case you use one mark-up value for all products or at least mostly all products. Excellent, you're an easy fix.

1. Go to: System Set Up>Mark Up Centre

In the Product Types section of the Mark Up Centre select each product type and reset the mark up for each one to the value you want to set at.

Here's a quick tip. It's likely that many will be a certain value. So why not reset all (at the top of the Mark Up Centre screen) to that value and then work through the Product Type list to adjust the ones that will have a different mark up.

Product Types

Select a Product Type: 3D Crystal

Current mark up: 300.00 %

Increase All Retail Prices By %: 0.00 %

Decrease All Retail Prices By %: 0.00 %

OR

Reset Product Type mark up values to %: 0.00 %

Product Type Adjustment Notes

If you use recommended retail for you sports catalogues DO NOT adjust Product Type Mark Up for the product types that are found in the sports catalogues.

The Product Types in Recommended Retail Import files are:

General Sports, Perpetual Trophies, Shields, Medals - Standard, Medal Cases

[Read the Help Document for clarification.](#)

2. Select a product type to work with (such as 3D Crystal)
3. Enter your mark up value in the **Reset Product Type mark-up values to %** field.
4. Press Apply

WARNING

This action will wipe out recommended retail price which will not be recoverable unless you re-import the entire range of catalogues.

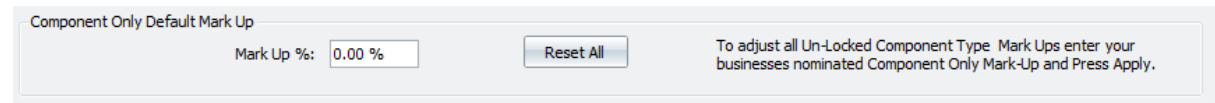
5. Continue through the list until you have set all of your products to the correct mark Up.

Step 4

Set Up Component Mark Up

Component Mark Up

Go to: System Set Up>Mark Up Centre



Component Only Default Mark Up

Mark Up %:

To adjust all Un-Locked Component Type Mark Ups enter your businesses nominated Component Only Mark-Up and Press Apply.

OK so we sell products right? Yes we do. We sell products in a catalogue break down. These products have components in them. A base, a column, a figure etc. Some products actually only have one component such as a resin trophy. These types of components are still created as products though.

However sometimes you may want to just sell a component. A customer may ask to buy a blank plaque or figure to fix the broken one they sat on. Or perhaps another trophy company buys a component of you. This is where the Component Only Default Mark Up comes into play.

Simply set the mark up that you want to sell your single components for. This may just be the same as what you sell the products for.

Set the value and press apply.

Step 5

Set Up Process Prices

For main Processes and for the departments

Set Up Process Prices

Now that mark-up has been taken care of let's get the main process charges set up for your business. Again we will do this based on your business model. At the same time we will also re-assign any processes to the right process type.

These Processes are directly related to products and are built into the products in your system (don't worry we can remove them if you wish.)

Process	Process Type	Built into
Artwork Type Setting	Artwork	All Corporate Awards
Trophy Engraving	Engraving – Diamond	All General Sports Trophies
Medal Engraving	Engraving – Diamond	All Medals
Perpetual Trophy Engraving	Engraving – Diamond	All Perpetuals & Shields
Glass Trophy Etching (S,M,L)	Sand Blasting	All Crystal & Glass Trophies
Acrylic Trophy Laser Engraving (S,M,L)	Laser Engraving	All Acrylic Trophies
Paper Weights Etching	Sand Blasting	All Paper Weights

- (S,M,L) denotes 3 processes – small, medium and large

So our task is to mould these prices to suit your business. We will set the prices and change the Process Type to suit you.

Prices

You have already set the Mark Up for Glass trophies etc. Now if you set the price for Glass Trophy Etching to, say, \$35.00 then that value gets added to the marked up price to give you an engraved price.

You can of course remove these processes from the products quickly so that you sell the items blank and then add the engraving charge on later. We'll deal with this as we go.

Process Types

Trophy Engraving is set to Engraving – Diamond but you may Laser Engrave or Sub Print your trophy plate. Easy, we will adjust this as we set the prices. Same goes with Sand Blasting of Glass Trophies. It's easy to swap this process over to laser Engraving.

What the heck is Artwork Typesetting doing in the corporate awards?

Glass trophies, acrylics etc all require artwork typesetting which is a process. In my shop we add this in as a little charge for this service. Seeing as how we have to employ a graphic artist and keep him happy with expensive computers and software we use this process charge to help pay for all this. By grabbing a buck or two for each item that goes through the art department we are helping to cover the overhead.

It's your call here. You can remove it quickly if you want to. You can even just leave it there for now as it is by default set at zero.

Set all Other Process Prices

You will see a stack of process prices built into AwardPro. These process prices all need to be adjusted to suit your business model. You don't have to set these prices now. Get to know the program a bit first and do it over the first few weeks. Just get the above mentioned ones done today.

Which is your Model?

Now it's time to take action. Please choose the model that suits your business and go for it. Perhaps you'll use a different model for sports and corporate.

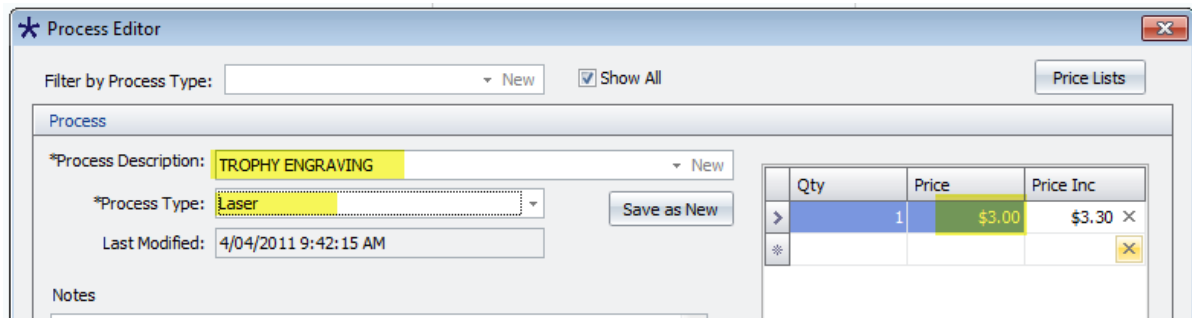
Model 1

I add engraving into the trophy price Sports trophies and/or Corporate Awards

So this means that you like to build the price into the sell price of your sports trophies.

Go to: Products>Process Editor

1. Open the Process Editor to form the Products Module.
2. Select Each of the processes that you wish to keep built into the trophies
3. Set the price you wish to include in the price of the trophy
4. Check the Process type and if it is not the way you do it select the correct process from the list
5. Save



Work your way through this list to complete the task

Process	Process Type	Built into
Artwork Type Setting	Artwork	All Corporate Awards
Trophy Engraving	Engraving – Diamond	All General Sports Trophies
Medal Engraving	Engraving – Diamond	All Medals
Perpetual Trophy Engraving	Engraving – Diamond	All Perpetuals & Shields
Glass Trophy Etching (S,M,L)	Sand Blasting	All Crystal & Glass Trophies
Acrylic Trophy Laser Engraving (S,M,L)	Laser Engraving	All Acrylic Trophies
Paper Weights Etching	Sand Blasting	All Paper Weights

Model 2

I DO NOT want engraving in trophy prices Sports trophies and/or Corporate Awards

So this means that you charge separately for the engraving. You want to show the product with a blank price.

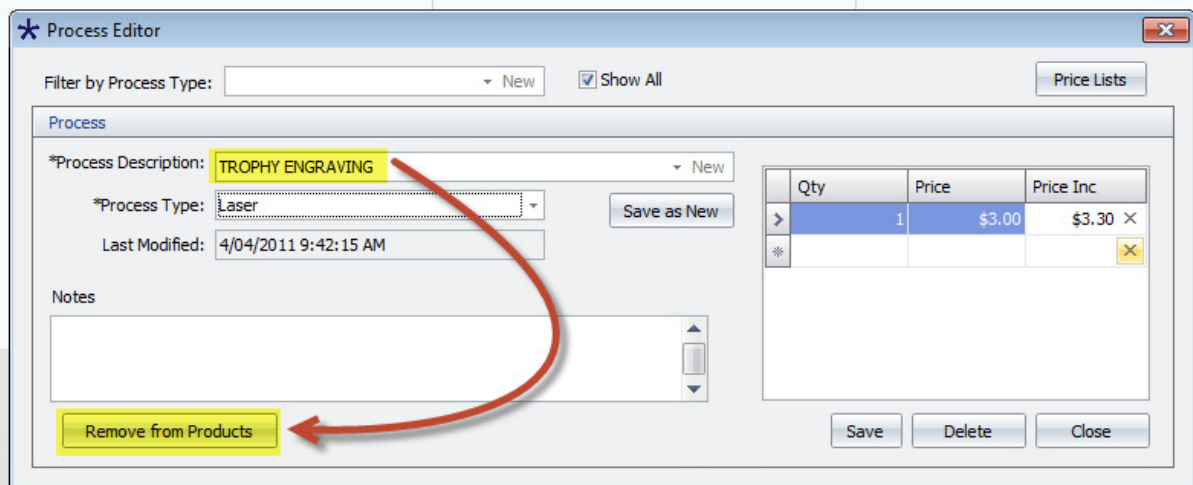
OK this means you need to remove the process charge from the products bill of materials. You can do this quickly but first consider this:

All of the Product inbuilt processes shown in the previous list have been set by default to zero so they have no effect on the sell price right now. You could just leave them in there for now and think this through. If you continue on now and remove them there is no way of bulk re-adding them.

If you're ready to remove the process from the product take the following action.

Go to: Products>Process Editor

1. Open the Process Editor to form the Products Module.
2. Select Each of the processes that you wish to remove from trophies
3. Select **Remove from Products**
This action will remove the process from every trophy that has it built into it
4. While you are here set your sell price for this process.
5. Check the Process Type and change this to the Process type that suits you
6. Save



Work your way through this list to complete the task

Process	Process Type	Built into
Artwork Type Setting	Artwork	All Corporate Awards
Trophy Engraving	Engraving – Diamond	All General Sports Trophies
Medal Engraving	Engraving – Diamond	All Medals
Perpetual Trophy Engraving	Engraving – Diamond	All Perpetuals & Shields
Glass Trophy Etching (S,M,L)	Sand Blasting	All Crystal & Glass Trophies
Acrylic Trophy Laser Engraving (S,M,L)	Laser Engraving	All Acrylic Trophies
Paper Weights Etching	Sand Blasting	All Paper Weights

Step 6

Adjust Built in Components

Adjust Built In Components

In Glass, Crystal trophies we have built in sand blasting resist charge factor as a component. This is to cover the cost of the resist. If you laser Engrave your glass instead of sand blast you may want to remove these components.

If you do sand blasting and use photo polymer resist then there is nothing to do here. Just move on to the next step.

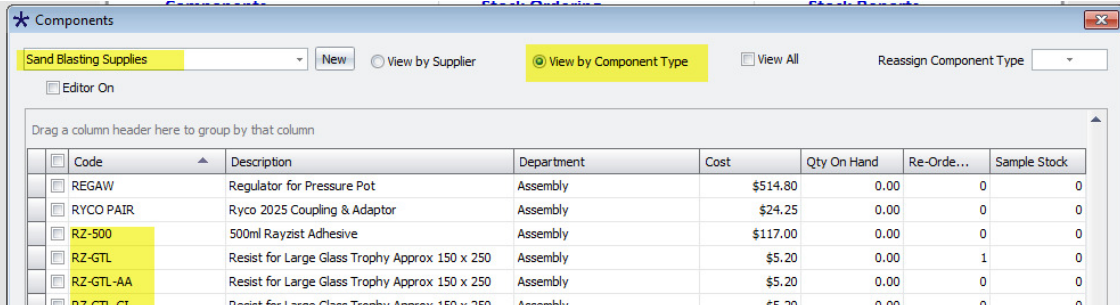
If you do sand blasting and use laser mask then all you have to do is reduce the cost of the built in components by around 30%.

If you laser engrave instead of sand blasting then you can remove these built in components.

If you outsource your laser engraving then you could change these components to be your order component for outsourced sand blasting.

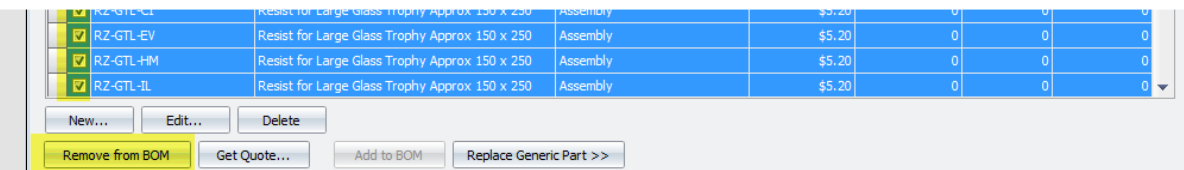
To remove all of the Sand Blasting Resist Components from Glass, and Crystal Trophies

1. **Go to:** Stock Control>Component List
2. **Select:** View by Component Type
3. **Select:** Sand Blasting Supplies
4. Scroll to the components that start with RZ-



Code	Description	Department	Cost	Qty On Hand	Re-Order...	Sample Stock
REGAW	Regulator for Pressure Pot	Assembly	\$514.80	0.00	0	0
RYCO PAIR	Ryco 2025 Coupling & Adaptor	Assembly	\$24.25	0.00	0	0
RZ-500	500ml Rayzist Adhesive	Assembly	\$117.00	0.00	0	0
RZ-GTL	Resist for Large Glass Trophy Approx 150 x 250	Assembly	\$5.20	0.00	1	0
RZ-GTL-AA	Resist for Large Glass Trophy Approx 150 x 250	Assembly	\$5.20	0.00	0	0
RZ-GTL-CI	Resist for Large Glass Trophy Approx 150 x 250	Assembly	\$5.20	0.00	0	0

5. Tick the check box next to all components that start with RZ-
6. Now Press the **Remove from BOM** button



<input checked="" type="checkbox"/>	RZ-GTL-CI	Resist for Large Glass Trophy Approx 150 x 250	Assembly	\$5.20	0	0	0
<input checked="" type="checkbox"/>	RZ-GTL-EV	Resist for Large Glass Trophy Approx 150 x 250	Assembly	\$5.20	0	0	0
<input checked="" type="checkbox"/>	RZ-GTL-HM	Resist for Large Glass Trophy Approx 150 x 250	Assembly	\$5.20	0	0	0
<input checked="" type="checkbox"/>	RZ-GTL-IL	Resist for Large Glass Trophy Approx 150 x 250	Assembly	\$5.20	0	0	0

All done. These components have been removed from all Products and the product prices have been adjusted accordingly.

Step 7

Import Your Customers & Suppliers

Import Customers and Suppliers

Import Your Customers

This is an important step. Export your customer list from your accounting package such as MYOB or Quick Books and import them into AwardPro using the import template. This makes it much easier to start writing orders. It saves you having to build each card as you go. You can tidy cards up as you work with them in AwardPro.

1. Export the list from your accounting software and save as an excel spread sheet.
2. Go to: Cards>Customers-Import Template
3. Re-arrange and drag the information into the correct columns.
4. Save the file as an Excel 97-2003 Workbook
5. From the Cards>Customers section select Import Customers
6. Find the desired file and import them into the system

[For more detailed instructions click here](#)

[For a video on this subject click here](#)

Import Your Suppliers

If you have special suppliers other than those already in AwardPro then you can import them into the system to save you writing the cards manually.

If you purchase goods from Interleisure – Melbourne, Styles Factory – Melbourne or Australian Trophy Wholesalers then you need to adjust these supplier card details. This is taken care of in the next step. **Do not import any of these suppliers now.** This is handled by changing the existing cards to these suppliers.

Interleisure – Brisbane becomes Interleisure Melbourne, Styles Factory – Brisbane becomes Styles Factory – Melbourne and PDU Trading becomes Australian Trophy Wholesalers. This ensures components and products get re-assigned to the right supplier.

WARNING

DO NOT IMPORT SUPPLIERS THAT ARE ALREADY IN THE SYSTEM. If you do you may find out that you have now got the supplier listed twice and that will be messy, so do not let it happen.

1. Export the list from your accounting software and save as an excel spread sheet.
2. Delete all suppliers that are already in AwardPro – [See list here](#)
3. Go to: Cards>Suppliers-Import Template
4. Re-arrange and drag the information into the correct columns.
5. Double check to make sure no suppliers already in the system are in the list to be imported.
6. Save the file as an Excel 97-2003 Workbook
7. From the Cards>Suppliers section select Import Suppliers
8. Find the desired file and import them into the system

[For more detailed instructions click here](#)

[For a video on this subject click here](#)

Step 8

Adjust Supplier Details

Adjust Supplier Detail

- If you purchase goods from Interleisure – Brisbane, Styles Factory – Gosford and PDU Trading – Brisbane then there is nothing to do here. Go straight to the next step.
- If you purchase goods from Interleisure – Melbourne, Styles Factory – Melbourne or Australian Trophy Wholesalers then you need to adjust these supplier card details

Interleisure and Styles Factory

These two suppliers just need to get their address and contact details changed. We have left the alternative details in the suppliers note pad on each Supplier Card.

1. Go to: Cards>Supplier Card
2. Open each of these Suppliers Card.
3. Change the address and contact details. You will find the details for the Melbourne office in the supplier card Note Pad

PDU and Australian Trophy Wholesalers

Australian Trophy Wholesalers and PDU share the same product range, pricing and components. They just sell to different areas/States. As there can only be one set of supplier component and products we have elected to set the program up with PDU's supplier card assigned to the product range. If you are an ATW customer you just need to:

1. Open the PDU card and rename it to Australian Trophy Wholesalers
2. Add in all of their address and contact details. These details are found on the Supplier Note Pad in the PDU card.
3. Once this has been done all components and catalogues will be correctly assigned to ATW.

There is a slight issue with the PDU transfer to ATW. ATW's prices on a few items are different than PDU's. Not by much and it is only a few items. To get the list of differences please call ATW.

Step 9

Set up your Departments

Set Up Departments

Go To: System Set Up> Departments

It is not critical that you set your departments up right away. You can come back to this once you have used the program for a while and gotten to read about Departments so you understand how they work and what they do.

Basically Departments are the sections in your business that require their own work list. They become a filter in the job schedule so you can see all of the Laser Engraving to be done or all of the jobs requiring art work. Departments also have a performance report so you can see how much money the department is making you.

Please read this document before proceeding with this task –[ClickHere](#)

The above mentioned Help Document will explain Departments and show you how to set up for your business.

Deleting a Department

Before you can delete a Department you must first remove any process type assignments from it.

Step 10

Set up your Process Types

Set Up Process Types

Go To: System Set Up> Process Types

It is not critical that you set your Process Types up right away. You can come back to this once you have used the program for a while and gotten to read about Process Types so you understand how they work and what they do. There are already a set of typical process types in the base version of the system that will be pretty close to what you do.

Process Types are processes you do in your business such as Engraving, Sand Blasting, and Sublimation etc. Perhaps Hand Engraving, Digital Printing and Garment Printing.

Process Types have process assigned to them such as:

The Process Type Diamond – Engraving has processes such as trophy Engraving, Medal Engraving, Perpetual Engraving.

Please read this document before proceeding with this task –[Click Here](#)

To adjust Process Types to your business model –[Click Here](#)

Finished

Start Writing Sales Orders

Finished

Well done you have successfully set AwardPro up for your business. There are still some things to do of course but right now you can start writing orders and get the system working for you. Other tasks such as setting prices for all processes, adjusting departments for your business model and building products such as custom centres and name badges need to be set up but that can wait while get stuck into order writing.

Start Writing Sales Orders

The most important thing you can do from here is start writing your sales orders into AwardPro and let it weave its magic for you. The best way to learn how to use the program is to just start writing your orders into it.

If you get all your orders in the system you will automatically get a complete Job Schedule and all the stock you need already sorted and waiting to be ordered.

There will be a few situations where it is not set up quite right or the price is different to the price you want to sell for. That's fine, just fudge through these to get the order in the system. I'll explain how to fudge shortly.

The idea is to have a computer in the showroom and write the orders directly into the system. However, if this is a bit daunting you may initially decide to keep hand writing your sales orders, and then sit down and add the order to AwardPro when the customer has gone.

Very soon you will have professionally written sales orders with lovely Order Confirmation forms for your customers and Job Sheets for your production team.

From day 1 you will have two sorts of orders to enter into AwardPro. 1. Orders that you have already ordered the stock for and 2. Orders that you have not yet ordered the stock for. Get all your jobs and sort them into these two piles. You start with the orders that have already had stock taken care of. This way we can see the stock order generate and push them through the system before writing sales orders that need stock ordered.

Start with a pretty simple order for trophies that are not too modified, just so you can ease you way into the system. Then work your way up to more complex orders.

Before Starting Let's get to know a few things that will help you on your way

What are you selling?

You are selling a Product or a Process. At the Add – Job Item you get a choice of 3 Item Types: Product, Component, Process. Don't use Component for now just focus on Product and Process.

★ Job Item

Quantity: 1

Item Type: ▼

Code: ▼ Find... New...

Unit Price Incl. Tax: 0.0000 Lock Sale Price

Description:

Size:

Purpose:

Discount %:

Sell Price Incl. Tax: \$0.00 Ex. Tax: \$0.0000

Manufacturing Instructions:

OK Cancel

Short Cuts and Macros

If you press the alt button you will see underlines appear under letters on buttons. This is typical window short cuts to activate the buttons. Just hold the ALT key down and press the buttons underlined key.

Also you will find that within screens you can tab to the next field to be filled in.

These are short cuts to help you fly through the program without using a mouse.

Save as You Go

During your learning curve we recommend that you Save after each step. For example, after adding a product to the order press the save button, and so on, so that you save as you go. Sometimes, whilst on your L plates, you can press the wrong button and potentially cause a twist in the system, which will cause an error commonly known as Bugs. There are not many of them but if you save as you go you will avoid losing data and having to start the task again.